BOGGS & CO.
WEALTH MANAGEMENT

The Professional Woman's Wealth Assessment

What's missing from your financial strategy?

Instructions:

Choose the answer that best reflects your current situation. This quiz is for educational purposes only and is intended to highlight potential planning opportunities.

1. Do you have a clear, up-to-date view of your full financial picture?

- A Yes, everything is organized and reviewed regularly
- B Mostly clear, but not consistently reviewed
- C Somewhat unclear or outdated
- D I don't have a complete picture

2. How would you describe your investment strategy today?

- A Diversified and aligned with my goals, timeline, and risk tolerance
- B Some diversification, but not fully aligned
- C Concentrated in a few areas (e.g., company stock, real estate)
- D I'm unsure how my investments are structured

3. How actively do you manage employer-based compensation (Restricted Stock Units, stock options, deferred comp)?

- A I have a strategy for timing, taxes, and diversification
- B I understand them but could optimize more
- C I don't actively manage them
- D Not applicable / unsure how they work

4. Are you factoring tax implications into your financial decisions year-round?

- **A** Yes, I proactively plan to help reduce tax exposure
- **B** Somewhat, mainly through retirement contributions
- **C** Not really, I focus on taxes during filing season
- **D** I feel I may be missing key opportunities

5. Are you maximizing tax-advantaged accounts (401(k), IRA, HSA if applicable)?

- **A** Yes consistently, including catch-up contributions
- **B** Contributing regularly, but not at the maximum
- **C** Contributing occasionally
- **D** Not currently contributing

6. Have career breaks or life events impacted your retirement savings?

- **A** Yes, but I've implemented a catch-up strategy
- **B** Some impact, but no formal plan to address it
- **C** Significant impact and I'm unsure how to recover
- **D** Not applicable

7. How confident are you in your retirement readiness?

- **A** Very confident, I've stress-tested my plan
- **B** Somewhat confident but with unanswered questions
- **C** Unsure if I'm on track
- **D** Concerned I may not be prepared

8. Do you have a dedicated emergency fund?

- A Yes, 6+ months of expenses
- B Yes, 3–6 months
- C Less than 3 months
- D No emergency fund

9. How prepared are you for unexpected life transitions (divorce, loss of spouse, career shift)?

- A I have contingency plans in place
- B I've thought about it but haven't formalized anything
- C Minimal preparation
- D Not something I've planned for

10. Do you currently have an estate or legacy plan in place?

- A Yes, comprehensive (will, trusts, updated beneficiaries)
- B Basic plan (e.g., will), but needs review
- C Outdated or incomplete
- D No formal plan

11. How intentional are you about wealth transfer to family or causes you care about?

- A Very intentional with structured strategies in place
- B Somewhat intentional but not fully structured
- C I've thought about it but haven't acted
- D I haven't considered this yet

12. Do you incorporate charitable giving into your financial strategy?

- **A** Yes, with tax-efficient strategies
- **B** I give regularly but without a formal plan
- **C** Occasional giving
- **D** Not currently

13. Are you aware of potential tax deductions you may be eligible for? (e.g., business expenses, charitable contributions, etc.)

- **A** Yes, I actively track and optimize them
- **B** Some awareness but not fully optimized
- **C** Limited awareness
- **D** Not sure what applies to me

14. Do you work with financial professionals to guide your strategy?

- **A** Yes, with coordinated financial, tax, and/or legal guidance
- **B** I work with one professional
- **C** I seek advice occasionally
- **D** I manage everything on my own

15. Do you have a written financial plan that evolves with your life?

- **A** Yes, comprehensive and regularly updated
- **B** Yes, but not consistently updated
- **C** Informal or partially documented
- **D** No written plan

Your Results

Mostly A's — Strategic Architect

You've built a strong, intentional financial foundation. At this stage, refining advanced strategies and regularly reviewing your plan may help you stay aligned with evolving goals and life changes.

Mostly B's — Focused Builder

You're doing many things well. With more coordination and fine-tuning, especially around taxes, investments, and legacy planning, you may be able to strengthen your overall strategy.

Mostly C's — Opportunity Explorer

There are meaningful opportunities to bring more structure and clarity to your financial life. A more coordinated plan could help improve confidence and long-term alignment.

Mostly D's — Planning Starter

You may be at an earlier stage of building your financial blueprint. Establishing a clear, personalized plan could help create direction and reduce uncertainty.

Your results can offer a helpful snapshot, but your full financial picture is more nuanced. If you'd like to explore how your wealth strategy aligns with your goals, values, and next chapter, I offer personalized wealth blueprint conversations designed specifically for professional women.

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